EMERGENT RISK INTERNATIONAL



Strategic Intelligence Estimate 2025

The Geopolitics of a New Era

A Note from Executive Leadership

A fundamental shift in world order brings with it more risk, but also novel opportunity for breakthroughs in government, business and human development

The world is experiencing a period of radical change and a fundamental reshaping of global order. While it is tempting to see this as either the best or worst of all outcomes depending on your worldview, the reality is fundamentally more complex. The dizzying array of complex global problems, overlapping relationships, political, financial, and corporate interests, state and non-state actors, and super-empowered individuals, combined with the lightning-fast development of Artificial Intelligence (AI), sets the stage for plenty of disruption in 2025. But with disruption comes all kinds of change. To paint this all as doom and gloom would be an oversimplification of where we are today. By and large, human development indicators continue to trend upwards (after a noticeable dip during the pandemic), and progress on a dazzling array of problem sets looks likely to accelerate rather than decline. And while politics is fraught from Washington, DC to Istanbul to Beijing, one could argue that this has always been the case.

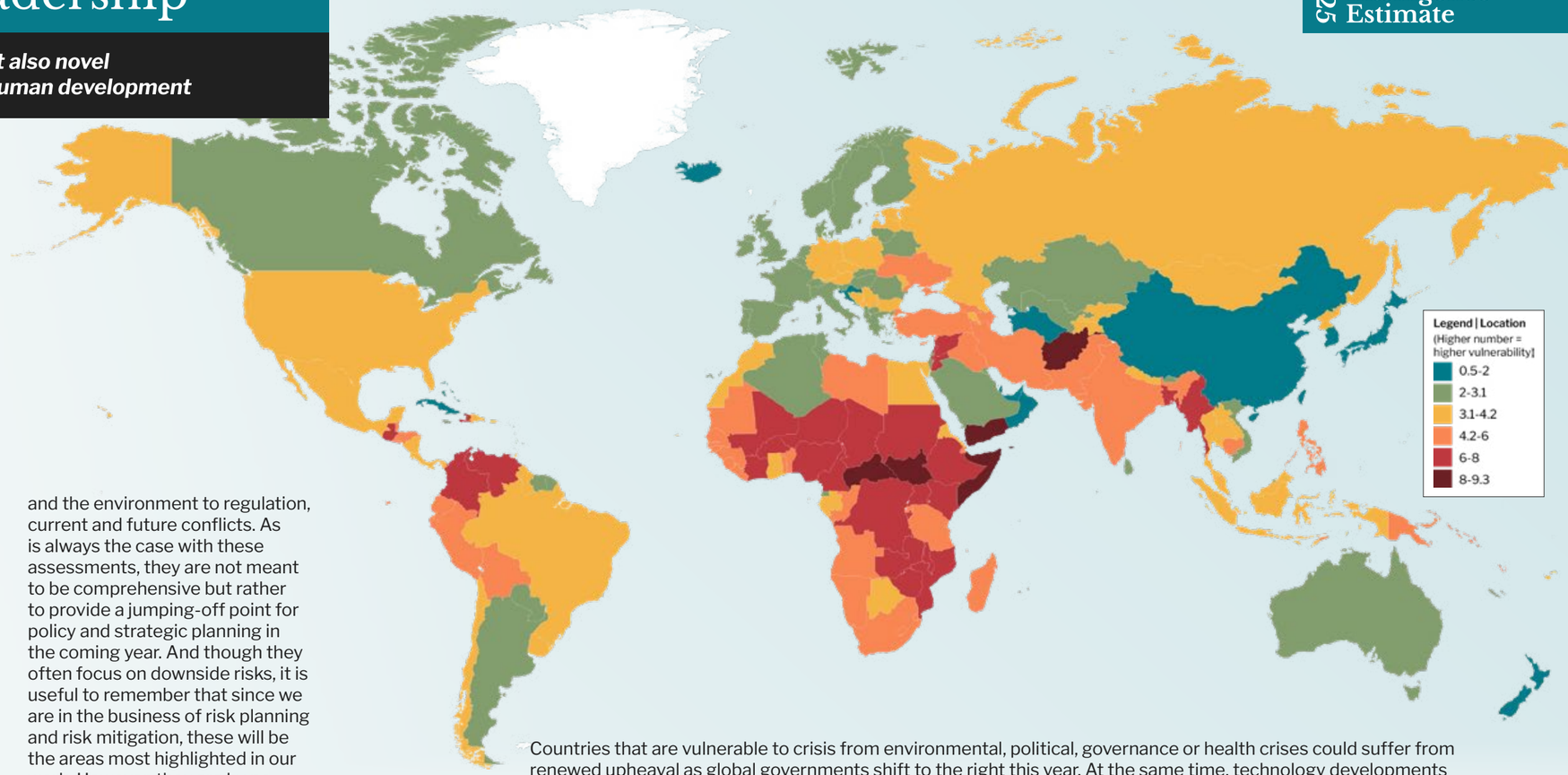
That said, it would also be incorrect to say that all is well in the world. Conflict rages in many corners of the world, with hot and cold wars threatening to boil over and harm even greater numbers of civilians, economies, and nations. Multinational organizations are pulled into these conflicts at very tactical levels as they lose access to talent conscripted for military duty, access to markets, and are sometimes directly attacked by foreign militaries or extremists. They are also affected far from the battlefield in the world of donor funds, brand, reputation, and valuation when forces both within and beyond their control shine a harsh light on perceived or real ties to these conflicts. Meanwhile, environmental emergencies are butting up against AI and the energy race for the future—a set of issues that are intertwined with global and very local politics. Finally, we are in a race with accelerated technology development. We face a choice of whether to develop it as a grand tool for democratic openness and improved outcomes for all, or as the ultimate weapon of oligarchs, autocrats, and despots. The interplay between these forces and their geopolitical and business impacts is at the heart of "*The Geopolitics of a New Era*"—our *Strategic Intelligence Estimate for 2025*.

The intersection of technology development and geopolitics is often underappreciated when we think about geopolitical risk and intelligence. Even in intelligence studies programs, instructors are often far more focused on teaching traditional methodologies and tradecraft than they are on the impact of technology on our geopolitical realities. The tendency to strongly emphasize past behavior as a predictor for future problems and to look at technology as simply another medium for actors to achieve their aims leaves out how rapid changes in technology are fundamentally shaping human thought, relationships, and behavior. As AI becomes more powerful and capable of more human-like tasks and behavior, this change in our environment will alter the way people, organizations, governments, and non-state actors think about and interact with each other, the environment within which they interact, and the financial stakes attached to how they thrive or survive in this new era.

In "*The Geopolitics of a New Era*," Emergent Risk International's global team of intelligence experts tackles these topics with a lens towards how they intersect on a variety of major issues, from global security and the environment to regulation, current and future conflicts. As is always the case with these assessments, they are not meant to be comprehensive but rather to provide a jumping-off point for policy and strategic planning in the coming year. And though they often focus on downside risks, it is useful to remember that since we are in the business of risk planning and risk mitigation, these will be the areas most highlighted in our work. However, they are by no means the only changes coming with this new wave of complexity. Many changes will be fundamentally positive, including faster cures for diseases like cancer and malaria, opportunities for changes in intractable political conflicts, and the potential to better answer some of the most fundamental questions about life and the universe.

In a world awash in information and data, we sincerely thank you for taking the time to read this report and to consider the ideas and impacts posed here as your organization plans for the coming year. As always, we are deeply grateful to our clients, partners, and supporters for their time, partnership, and continuous interest in our work. We look forward to delivering even more value and exciting developments in 2025.

Global Crisis Vulnerability Risk
Source: European Commission, INFORM Index for Risk Management



Countries that are vulnerable to crisis from environmental, political, governance or health crises could suffer from renewed upheaval as global governments shift to the right this year. At the same time, technology developments and shifts in governance could offer promise, including changing the direction of intractable conflict and technology changes driving better health and development outcomes.

Executive Leadership Team



Meredith Wilson
Chief Executive Officer & Founder

Meredith is the Chief Executive Officer & Founder of ERI. She has spent over two decades working in intelligence, first in government and then building some of the earliest private sector intelligence programs. She founded ERI in 2014 to build innovative intelligence programs that help companies leverage the best that intelligence can offer – but within the framework of business.



Brady Roberts
Chief Operating Officer

Brady is the Chief Operating Officer and is based in Austin, Texas. He joined the company in January 2018, where he oversees ERI's daily operations, trains clients and consults directly with customers, leveraging over 20 years of experience in the intelligence field.

About Us



Our Vision

We are a risk insights and forecasting company. We create and protect value through industry-leading intelligence, technology, training, and talent. We believe that high-value risk intelligence supports a whole organization by providing future-forward intelligence, context and analysis that is laser-focused on your business and value chain. Come work with us. Let us show you how we can be your partner in building #FutureForwardResilience.

How we monitor business security risk

- We understand business. Through our work designing fit-for-purpose intelligence programs or our daily and weekly analysis, we put business and business impacts first.
- We rely on data. We are transparent in our sourcing and use data and fact-checked information to ensure a disinformation-free, holistic understanding of the operating environment, grounding our assertions in reality and contextual relevance.
- We value effective communication. We understand that business professionals need to receive intelligence in a clear, concise medium that is quick to understand and evaluate. Intelligence must be delivered in a format that works for busy decision-makers.
- We build capacity. While other companies create dependencies on their intelligence products or embedded staff, we help our clients build self-sustaining intelligence functions with strategic aims, inputs from our analysis and trained, supported teams to manage a program. Senior professionals with experience building intelligence programs in government and the private sector oversee these engagements.

How we build future-forward, resilient organizations

Subscription and Bespoke Intelligence Products
ERI provides world-class subscription analysis products that consider the full scope of business risk and, importantly, how these risks impact across business value chains. We cover every region of the world with analysts who hail from these regions, providing important cultural and social context that can sometimes be absent in products written by non-native analysts. ERI provides investigative and due diligence reporting. Our global reach allows us to target corporations and businesses globally for verification and a clearer understanding of business structures and ownership.



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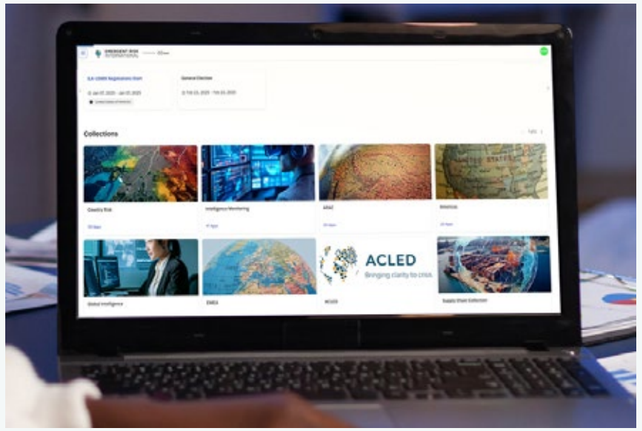
People Solutions

ERI’s embedded staffing program gives clients a one-stop, immediate solution when you need an in-house team. By bringing our expertise and entire product suite to bear, ERI can set up and run an in-house intelligence program – tailored to your needs – from day one.

Our trained analysts hit the ground running, giving you immediate capability and the ability to respond to short and long-burn crises with foresight and expertise. From site analysis to geopolitical forecasts, your analyst team will set you up for success, creating a competitive advantage and preparedness for uncertainty across your supply chain and broader business.



Our People Solutions program brings together ERI’s entire suite of products into a single, readily deployable solution.



Technology: The Emergent Risk Situation Room™

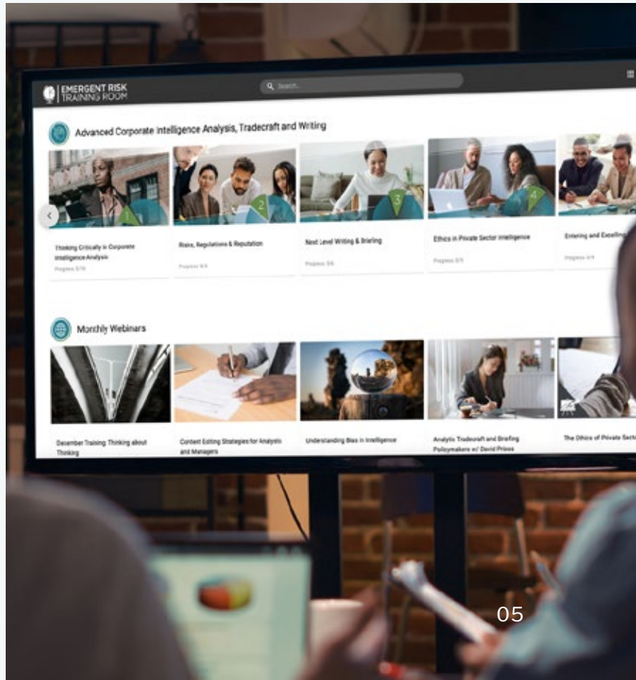
The Emergent Risk Situation Room™ platform combines ERI’s analysis, country reports, daily reports, live analytics and data feeds on risk intelligence and resilience issues. These encourage users to utilize high-quality data-based information and sources to build their analysis and eliminate ‘cut and paste reporting’ as the primary source of their analysis.

Access partner integrations from the likes of Factal and ACLED that give analysts access to real-time security, natural disaster, weather, news and conflict-related information in one pane – giving unrivaled access to the ultimate analyst’s toolkit.

Training

As part of our vision of self-sustaining corporate intelligence programs, our training helps analysts grow in their roles and develop long-term careers.

- Corporate Intelligence Analysis, Tradecraft and Writing. Our foundational training course takes analysts through all the elements of an intelligence function.
- Data Visualization and Analysis. We bring our understanding of data and infographics in communication to our clients’ teams.
- Advanced Analysis. For analysts with potential, we train them for senior roles, building their analytical skills and credibility to strengthen their performance within their own teams.
- Analyst to Manager Transitions Course. As your team grows, you will need leaders to keep your intelligence program functioning and become truly self-sufficient. This course helps analysts transition to leadership.



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What's Inside

A Note from Executive Leadership	02	AI, Technology and Conflict	16
About Us	04	AI and the Future of Democracy	18
Credits & Contributors	06	Elections in 2025	20
What's Inside	07	Regulation, Trade and Geopolitics	22
On the Edge of Disruption: Who's At Risk in 2025	08	AI, Climate and the Environment	24
Reshaping the Global World Order	10	Conflict, Geopolitics and Supply Chains	26
Choices and Challenge: China in 2025	12	Technology and Global Discontent	28
Upheaval and Opportunity: The US in 2025	14	I3: Retrospective for the Future	30



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On the Edge of Disruption: Who's At Risk in 2025

The Israel-Palestine conflict will remain the major driver of Middle East insecurity in 2025, with repercussions that will trigger spin-off conflicts and violence across the region and globally.

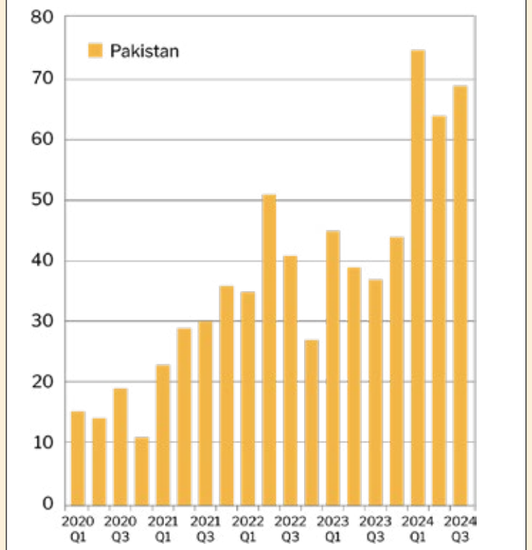
Even as Israel negotiates with Hamas regarding the future shape of Palestine, the effects of the last 15 months will drive systemic insecurity and individual acts of violence. Further strikes and counterstrikes by Israel and Iran are possible across 2025, with the new US administration's policies toward Iran potentially driving unpredictable reactions. The Syrian opposition's sudden victory in the Syrian civil war will reverberate around the region, as Syria's neighbors seek to protect their interests while the country rebuilds. The collapse of the Assad regime has forced Russia out of its main Mediterranean stronghold and the Kremlin's search for a continued regional presence risks destabilizing other conflicts. Iran will continue to support its proxies across the Middle East in striking at Israeli and US interests, including Houthi rebel attacks on Red Sea shipping and militia attacks in Iraq and elsewhere. The conflict risks driving recruitment for extremist organizations, including Islamic State, leading to increased threats of extremist mass casualty attacks on Western interests.

The risks of extremist violence will rise in 2025, as insecurity in multiple regions creates opportunities for militant groups to recruit, train and operate.

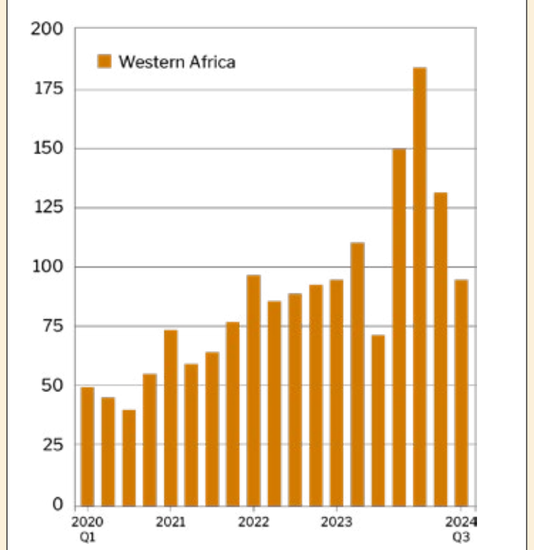
The New Year's Day attacks in the US demonstrate the potential for resurgent extremism - both domestic and international - to shape security in 2025. In addition to extremists inspired by the Middle East conflict, political instability in South Asia and Africa will foster extremist violence, primarily targeting national governments, but also potentially threatening international interests. In Africa, coups across the Sahel in recent years have created military juntas focused on securing their own rule rather than combating extremism, while the withdrawal of regional and UN forces has reduced pressure on extremist groups. While some of these groups will be domestically-focused, the expansion of ungoverned spaces risks allowing extremists groups with a history of attacking international targets – such as al Shabaab – to again expand their operations. In Asia, Pakistan's ongoing political crisis and the safe haven created by the Taliban in Afghanistan will see rising extremist attacks continue into 2025, while Baloch extremists will continue to attack Chinese and Pakistani government interests. Afghanistan will also be a focus for Islamic State in Khorasan Province (ISKP), which will continue its conflict with the Taliban, but also look to target Central Asian states, Russia, and possibly even Europe. The end of the Syrian civil war risks revitalizing Islamic State, particularly if thousand of fighters detained in Syria are released or escape.

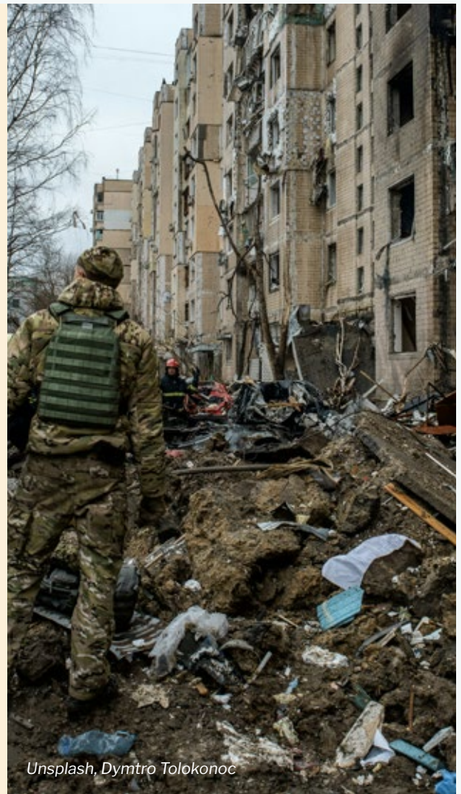


Pakistan: Extremist bombings
Source: Armed Conflict Location and Event Dataset (ACLED)



West Africa: Extremist bombings
Source: Armed Conflict Location and Event Dataset (ACLED)




Unsplash, Dymtro Tolokonoc

The risk of conflict in the South China Sea will continue to rise in 2025, as China tests the limits of the new US administration's support for its allies.

Tensions around the Philippines' Second Thomas Shoal will remain a flashpoint through 2025, as the Philippines pushes back against China's encroachment. The Chinese coastguard will continue to attempt to block the Philippines navy's resupply missions to its outpost on the shoal, with any miscalculation potentially escalating toward conflict. The Philippines government will seek clear assurances from the new US administration that a conflict with China in its Exclusive Economic Zone would trigger the Philippines-US defense treaty, while China – and the US' other Asian allies – will be closely watching how the Trump White House responds.

Russia's hybrid warfare puts Georgia, Moldova and other Eastern European countries at risk of destabilization in 2025.

While 2025 and the new US administration will possibly bring a return to negotiations between Ukraine and Russia, Moscow's hybrid warfare in Europe will continue as the Russian government seeks to establish a buffer of compliant states on its Western border. Foremost among its goals will be seeking to prevent Georgia and Moldova from moving closer to European Union membership, and Russia will be prepared to foment political instability, unrest, violence and potentially even territorial incursions to achieve its aims. In the Baltic and Western Europe, Russia will continue its campaign of sabotage and cyberattacks, targeting energy, communications and transport infrastructure, particularly as Germany and other countries head toward elections.

Reshaping the Global World Order

New governments in the US and abroad will seek to reshape the established world order, challenging global norms but potentially creating novel solutions.

Changes to the US approach to global affairs will create upheaval but also shifts in up to now intractable problems – creating space for novel opportunities for resolution.

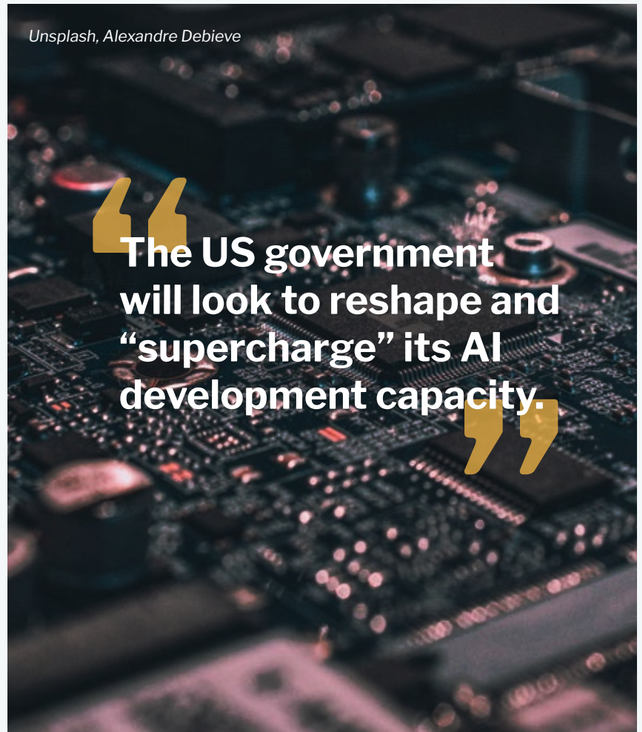
The Trump administration's plans to realign global systems were previewed during the 2016-2020 administration and informal actions in the lead up to the January inauguration. Utilizing unconventional means – such as social media – to bring countries to a bilateral negotiating table even before the administration takes office, previews the president-elect's intent to continue to bypass bureaucratic structures. The overarching focus on trade and tariffs underscores his view that using direct negotiations to leverage US economic power over countries' fiscal "skin in the game" is the most effective way to win in global geopolitics. Nations, organizations, state and municipal partners will find that their approach to politics and governance will necessarily shift to work effectively with the new administration, at times creating brand, reputation and political risk concerns but also opening the door for new approaches. Unpalatable negotiations with countries like Russia and more brazen tactics and support of Israel not seen in the prior administration's approach to the conflict there may be more likely to push these conflicts to a conclusion – opening potential opportunities for regional progress, albeit at the cost of established norms and systems that have failed thus far.

The AI technology race will accelerate and take unexpected turns that reshape the world order amidst a new approach to the technology sector's influence on government.

While tariffs and social media will be the US administration's tools of geo-economic power, AI will be the lubricant that accelerates changes to global audiences' perceptions of global governments. The US government will look to reshape and "supercharge" its AI development capacity, alongside ethically-complicated relationships with technology entrepreneurs that own perception shaping technology. Meanwhile, China and Russia will seek to do the same – with autocratic state-driven initiatives increasing their chances for success. Congressional checks, legal hurdles and civil society will seek to limit government overreach and corruption. This will continue to slow the US development timeline but probably continue benefitting democratic systems that seek to protect the power of the people.

The US administration will use 2025 to reshape the global system, reducing the influence of multilateral organizations and free trade agreements.

The US government will not be isolationist and will remain actively engaged in promoting its interests around the world in 2025 and beyond. The new government will, however, reduce its commitments and interest in many multilateral organizations and institutions, potentially withdrawing from the Paris climate accords and the World Health Organization, and probably reducing US funding to the UN system. Some Western governments, particularly those ideologically aligned with powerful actors in the incoming US government, will follow the US lead, while others will not, amplifying divisions in the European Union over issues such as climate change and immigration. The new US government's laser focus on tariffs will ripple through international markets and trading, increasing market volatility, uncertainty, nationalism and protectionism while slowing negotiations of cornerstone free trade pacts like the US-Mexico-Canada (USMCA) agreement. Despite some concerns, the US government will probably not step away from its alliances and security arrangements, although it may use them as another blunt instrument of negotiation with those partners and reprioritize its security assistance towards the Middle East over other regions of the world.

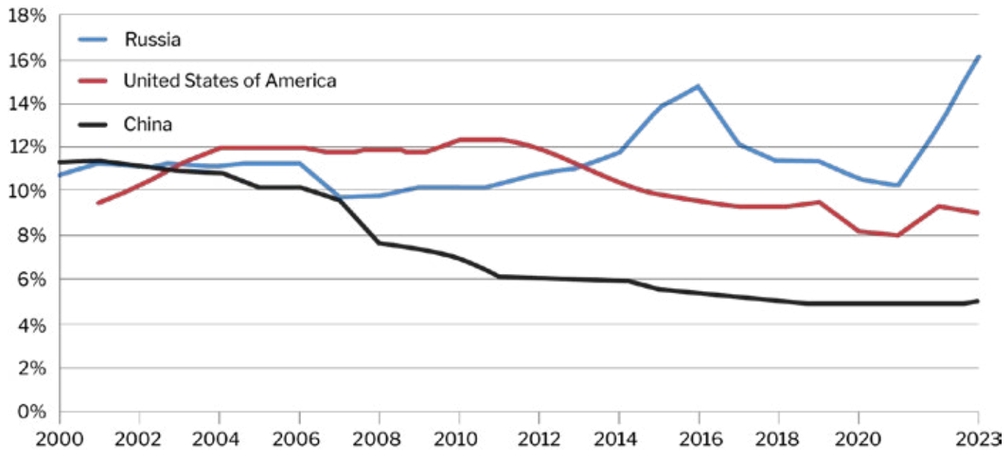




China will see opportunity in 2025 to change the world order to its benefit, attempting to fill the spaces left by a refocused US.

The Chinese government believes the current world order does not serve its interests nor fairly reflects its role as a global power. As the US steps back from multilateral organizations, China will take the opportunity to assert more leadership of international organizations and shape international norms on climate change agreements, global trade regulation and human rights in ways that benefit China's economy and Chinese companies over Western firms. Judging that the new US government may be less willing to back its allies and partners in the Asia-Pacific, Beijing will increase pressure on its neighbors, seeking to establish a degree of dominance in Asia that excludes US and Western influence and sees Japan, South Korea and Southeast Asia more often defer to its wishes. Further afield, China will revitalize its Belt and Road Initiative as an alternative to US engagement, offering to construct much needed economic infrastructure across the developing world, without the US' concerns over human rights or democracy.

China, US and Russian Military Spending as a Share of GDP
Source: SIPRI Military Expenditure Database



Amid excessive Russian military spending alongside a stagnating economy, President Vladimir Putin has sought to maintain the country's fading prestige, even as the world's two largest economies – the US and China – pull further ahead in global power and influence.

Russia will try to further expand the Brazil-Russia-India-China-South Africa (BRICS) grouping as an alternative global system, including for sanctions-free trade and finance, while also expanding its influence in Eastern Europe, Africa and Asia.

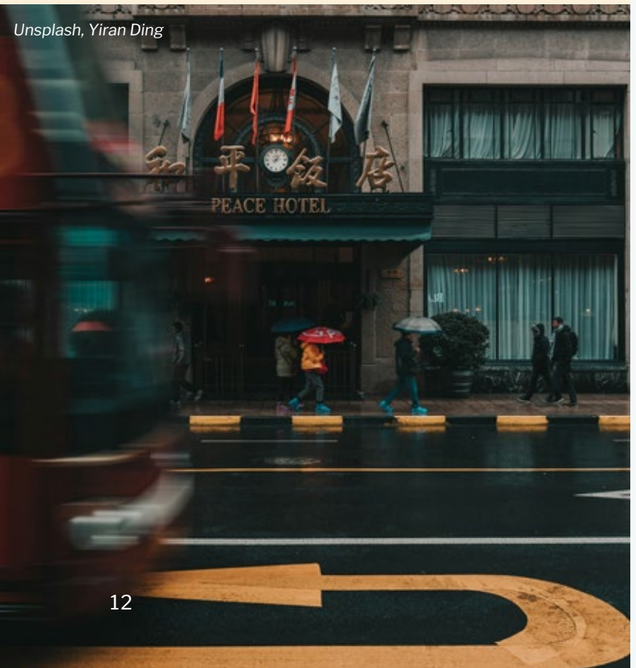
Like China, Russia perceives the international system as fundamentally shaped against its interests and actively used by the US and Western Europe to undermine its security and damage its economy. To this end, Russia will actively continue to damage and destabilize global order, using its hybrid warfare campaign to destabilize democracies, damage infrastructure and eliminate critics. Russia will also assist compliant and friendly regimes in Africa, the Middle East and Latin America, seeing opportunities to build its influence at the expense of the West and secure access to sanctions-free trade partners. Russia will look to further expand the BRICS grouping, after adding four new members at the start of 2024, seeing the grouping as an opportunity for international leadership – although China, India and Brazil will resist Russian dominance. BRICS is explicitly an alternative to the existing international system and Russia will push the grouping to adopt shared trade and finance systems – including trade in alternative currencies to the US dollar and use of Russia's international finance system – that enable it, China and Iran to avoid international sanctions.

Choices and Challenge: China in 2025

Deteriorating US-China relations will ripple through global geopolitics in 2025, reordering economic relationships, creating security challenges and driving Beijing to expand its global influence.

China will seek to strengthen its position as a global leader, believing the new US administration will be more domestically focused and more isolationist.

Sensing an opportunity, China will portray itself as an alternative to US global leadership, proclaiming stability and predictability to its international friends. In Asia and the Pacific, this will involve expanding China's security cooperation with willing partners, while further afield China will use infrastructure and investment in Africa, Latin America and Eastern Europe as leverage for access to resources and markets. China will watch closely for emerging breaks between the US and its allies – particularly in Asia – alert for chances to reduce US influence and presence. Relations with Western Europe will remain difficult and dominated by trade disputes and allegations of espionage and sabotage. Conversely, China's relations with Russia will draw closer, providing markets, finance and resources to keep Russia's economy afloat, while skirting the edges of Western sanctions regimes. China will see the next four years as a chance to secure access to critical minerals in South America and Africa with long-term investments, hoping to outcompete Western companies at a time when US trade policies make it a less attractive export destination.



Unsplash, Yiran Ding


Unsplash, Lin Dai

China-US relations will deteriorate further in 2025, as the Chinese government retaliates against expanded US tariffs and trade restrictions.

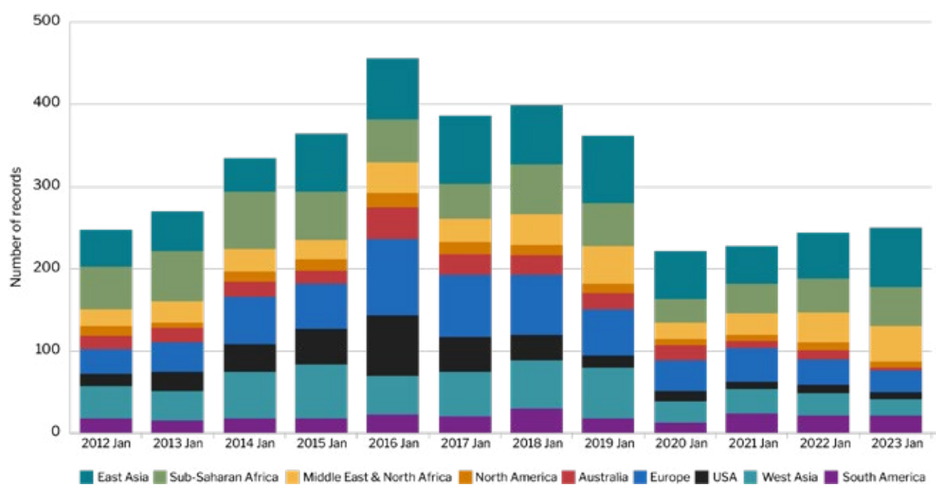
Having dealt directly with President Donald Trump in his first term, President Xi Jinping will have few illusions about the next four years. New US tariffs on Chinese imports will be met with reciprocal Chinese tariffs on US exports, particularly agricultural products, where China feels it has good alternative suppliers. Expanding US and allied technology export restrictions will cause China more economic pain, as Beijing has fewer easy pathways to access advanced technology, particularly semiconductor chips, chip design equipment and AI technology. As a result, Chinese industrial espionage and cyberattacks will expand in 2025, particularly targeting US, Taiwanese, European, South Korean and Japanese advanced technology firms and research institutes. The Chinese government has spent much of the past four years establishing regulatory processes to enable it to legally curtail critical exports to the US and elsewhere. Should the US-China relationship deteriorate further, 2025 will be the year these restrictions are put into action, potentially disrupting global technology supply chains. While wholesale bans on exporting critical minerals or technologies such as batteries – where China dominates world supply – are less likely, Beijing has shown its willingness to target companies, industries or countries that offend it.

> **"The fundamental challenges to the Chinese economy will remain the same as they were through 2024: debt, an aging population, weak consumption and a distressed real estate market."**

China's economy will continue to underperform in 2025, driving the government to prioritize manufacturing and export industries to trade its way back to growth.

China's sluggish economic growth will be the government's primary concern in 2025. The fundamental challenges to the Chinese economy will remain the same as they were through 2024: debt, an aging population, weak consumption and a distressed real estate market. The Chinese government's limited fiscal policy levers give it few options to spur growth through domestic consumption, while corruption investigations and regulatory crackdowns will leave business and consumers alike wary. Needing to deliver growth and jobs to maintain its legitimacy, the Chinese government will lean on its traditional growth engines, but claims of industrial overproduction and dumping will drive trade disputes with the US, Europe and others.

China's Global Investment Tracker
Major investments and construction contracts
Source: The Heritage Foundation, China's Global Investment Tracker



China will likely seek to expand its investment in the Global South this year, with President Xi Jinping looking to revitalize the Belt and Road Initiative to help its flagging economy.

Although an invasion of Taiwan is unlikely in 2025, China will continue to pressure the island economically and militarily.

The Chinese military will probably not be ready to attempt the difficult amphibious operations required for a cross-strait invasion of Taiwan in 2025. However, Beijing will be watching closely for any signs of softening US military support for the island and will probably seek to test the new US administration at some point in 2025, manufacturing a crisis to gauge how President Trump and his Cabinet will respond. As US sanctions on China force Taiwanese firms to limit ties with the mainland, the Chinese government will punish Taiwan with trade restrictions and hybrid warfare – including cyberattacks, cyberespionage, detention of travelers, as well as maritime and airspace incursions – continually eroding previous unofficial boundaries between the island and mainland.

Upheaval and Opportunity: The US in 2025

The first months of President-elect Donald Trump's second term will result in regulatory whiplash, while nontraditional Cabinet appointments will present both opportunity and risk for businesses.



Unsplash, Brandee Taylor

The president-elect's second term will begin with a burst of executive action, changing immigration operations, reshaping how rule-making federal agencies do business and creating policy whiplash for some sectors.

President-elect Donald Trump intends to issue several executive orders in the first days of his return to office. He will be able to withdraw the US from treaties, international agreements and multilateral organizations, and will probably do so in select cases, signaling changes to US government commitments on climate change, immigration, trade and other issues. The president-elect will also issue new directions to the federal government's regulatory agencies, such as the Environmental Protection Agency, the Securities and Exchange Commission and the Surface Mining Reclamation and Enforcement Agency. These orders will change how federal agencies interpret legislation, how they spend federal funds and how they administer business regulations. For some industries, such as renewable energy, oil and gas and the automotive industry, these executive orders could bring substantial, sudden change. The president-elect's executive orders on immigration are likely to receive prominent attention and to be polarizing, creating complex engagement challenges for the private sector. Meanwhile, the president-elect will likely use emergency economic powers to implement his immediate trade and economic agenda. While the new administration is likely to begin with broadly applied tariffs, these tariffs are likely to become more complex and specific as multinational companies and foreign governments intensively lobby for desired nuances.

The emphasis on business and the influence of wealthy business owners in the new administration will create public and social backlash directed at major multinational companies and their executives.

President-elect Trump's second term will bring a variety of non-traditional actors into the government – most visibly – high-powered technology entrepreneurs and financiers. The visible influence of some of these individuals will almost certainly increase public backlash aimed at large corporations who are perceived to negatively impact the lives of people in the US and abroad. Unlike during President-elect Trump's first term, corporate leaders have taken more public steps to support the incoming administration including adjusting public-facing Diversity, Equity and Inclusion (DEI) policies and donating to the president-elect's inauguration fund. After the murder of a healthcare CEO in December 2024, a cult of personality has emerged around the shooter, alongside public betting on outcomes associated with his capture and the gamification of threats to CEOs and executives on multiple social media platforms. The highly visible confluence of US government and business interests, combined with a souring public view of multinational business and increased disinformation risk will increase the need for close monitoring of personnel safety and corporate reputations in 2025.



Unsplash, Nils Huenerfuerst

Policy reforms and new initiatives that require Congressional approval will be more difficult to achieve given the Republicans' narrow House majority, despite the party's control of both chambers of Congress.

While the president-elect will extensively use executive orders, many of his policy priorities will require legislative action, including reauthorizing tax cuts; rolling back elements of the Inflation Reduction Act or the Affordable Care Act; and abolishing some federal government agencies. Such policies will usually require congressional action, a path likely to be possible but complicated through the first two years of the administration. At least until the 2026 midterm elections, the Republican Party will control both the House and the Senate, but the Senate's filibuster rule and a narrow majority in the House mean that at least some of President-elect Trump's priorities are likely to be frustrated. The outgoing administration was careful to construct legislation in ways that will be difficult to undo, such as the Inflation Reduction Act, which provides benefits for Republican-held congressional districts, potentially making it hard for vulnerable Republican representatives to vote for its reversal.

The president-elect's Cabinet will include members whose resumes are limited to industry and multinational companies or who otherwise possess less conventional backgrounds, potentially shaking up how the US government bureaucracy operates, creating both uncertainty and opportunity for business.

The president-elect has been clear that he wants to reform and shrink federal bureaucracy and that he wants a Cabinet drawn from outside the Washington, DC, mainstream. Most of President-elect Trump's Cabinet nominees will be approved, bringing several CEOs and industry senior executives into government. Others – such as Elon Musk – will operate from outside formal government structures but wield exceptionally wide influence, drawing questions about conflicts of interest and other concerns. While these newly minted Cabinet members will face a steep learning curve on government processes, they will bring their own unique experiences to the challenges facing government, potentially offering new solutions to old problems and finding ways to build better partnerships between government and the private sector. President-elect Trump's desires to reform government will be harder to achieve, however. US government spending most predominantly consists of the defense budget, social security and Medicare, all of which are politically difficult to cut and have substantial congressional support, so Trump's Cabinet and advisers will have to find creative solutions to achieve any meaningful reform.



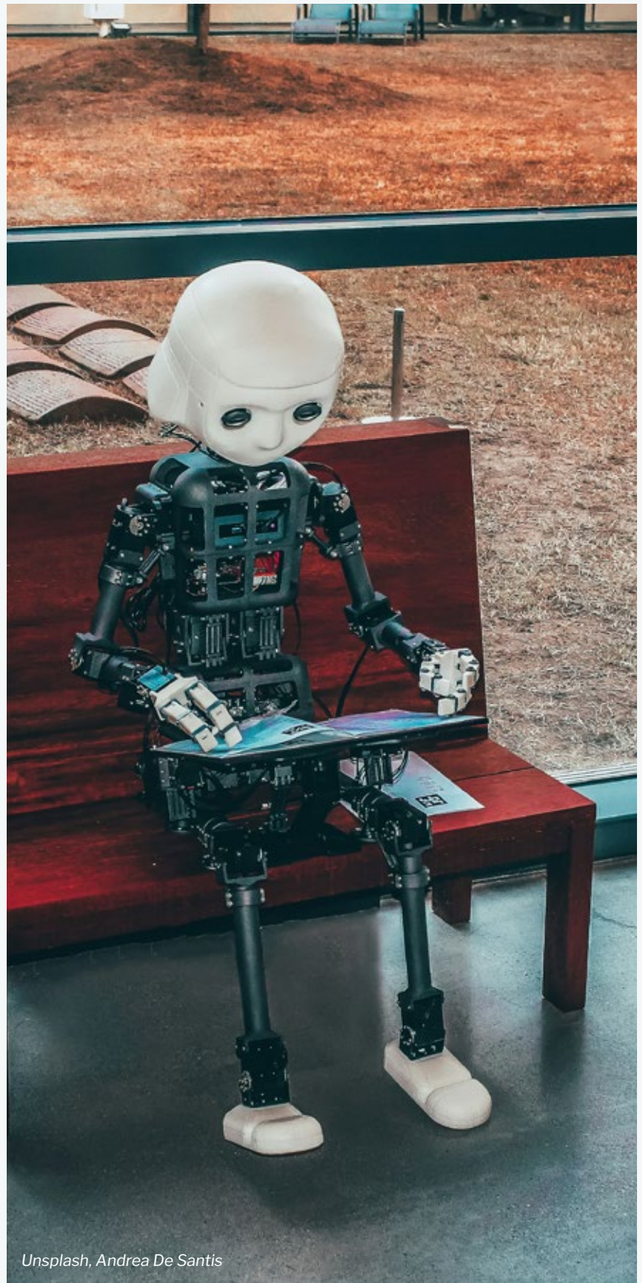
Pexels, Jan Zakelj

AI, Technology and Conflict

Combatants, militants and extremists will repurpose artificial intelligence and emerging technologies to create cheap, innovative new weapons, expanding the reach and lethality of conflicts.

Militants, extremists, hackers and other state-sponsored malign actors will exploit AI systems to cause harm, not only intensifying cyberattacks and disinformation, but also developing cheap autonomous weapons.

The weaponization of AI technology risks triggering competition that drives public scrutiny and greater regulation of technology companies. The Russia-Ukraine battlefield will be a critical testbed for this weaponization of AI, as Ukrainian forces use satellite internet and AI systems to fly drones against Russian forces. As technology advances further, AI-embedded systems will allow remote operators to control or oversee deployment of several weapons at once. Military observers claimed recently that AI technology has enabled Ukrainian drones to increase their hit rate from below 50% in 2023 to nearly 80% this year. Learning from the experience of multiple consequential elections in 2024, Russia, China, Iran and other actors will increasingly exploit generative AI to develop more sophisticated disinformation, intensifying the arms race between disinformation creators' efforts to exploit AI and technology companies' efforts to identify and prevent misuse. In 2024, AI-powered disinformation remained experimental, with Western governments and technology companies detecting, halting and publicizing its use. In 2025, however, AI-generated disinformation risks surging, enabling malign actors to create more realistic audiovisual content, create more compelling narratives and conduct sophisticated social engineering to steal industrial secrets. As deepfakes grow harder to spot, actors will also use disinformation to conduct influence campaigns and exploit political polarization to sow distrust in adversary government institutions. These concerns will become increasingly pressing around critical elections in democratic countries, elevating public and regulatory scrutiny on technology companies and content moderation policies.



Unsplash, Andrea De Santis

> **"AI technology has enabled Ukrainian drones to increase their hit rate from below 50% in 2023 to nearly 80% in 2024."**



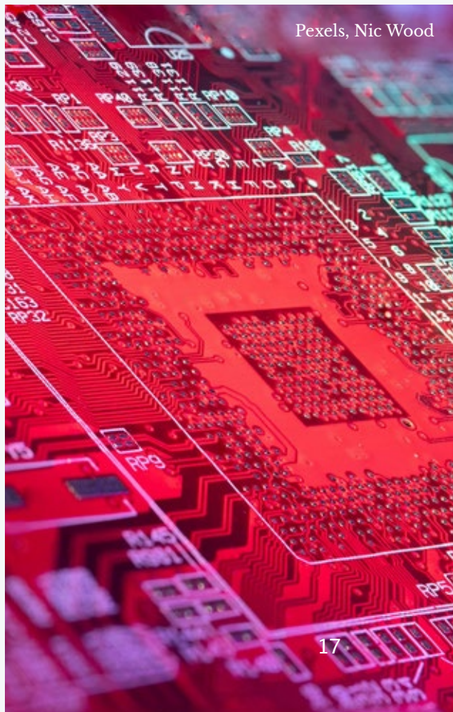
Unsplash, Dan Cutler

The utilization of low-cost "swarm" drones, artificial intelligence and other new technologies in conflicts will add a new dimension to asymmetrical warfare, illustrating how new technologies risk being repurposed for malign purposes.

The world's current conflicts will continue to drive drone technology, as actors seek cost-effective airborne and unmanned weapons. Drone swarms have been used to overwhelm air defense systems, reducing the technological advantage of Western nations. The Russia-Ukraine conflict illustrates the easy repurposing of cheap commercial drones for surveillance and military purposes, posing additional airspace security challenges for governments, critical infrastructure and industries such as extractives. Hezbollah has released drone-captured footage of Israeli infrastructure and offshore gas rigs to convey threats and demonstrate the capability to strike targets. Militants in Colombia and drug cartels in Mexico are already employing commercial drones to transport cocaine, conduct surveillance and release explosive devices from the air. The proliferation of civilian drones in armed conflicts and crime will require new practices in asset protection and anti-drone jamming equipment will become more common around critical infrastructure and sensitive sites.

Governments will increasingly use sanctions and export restrictions to target the application of dual-use technologies and components for conflict and war, complicating the supply chains of legitimate users of new technologies.

The conflicts in Ukraine and the Middle East demonstrate the rising use of low-cost drone technology in war and the future market for mass-produced cheap drones. Russia and militant groups like the Houthis and Hezbollah rely on Iran-supplied drones, which contain many dual-use Chinese-built parts. In response, the US government has sanctioned Chinese suppliers that provide US adversaries with dual-use technology. In October, it sanctioned for the first time Chinese firms that collaborated directly with Russian defense firms. Conversely, China has sanctioned a US firm for selling police drones to Taiwan, blocking the US company's access to Chinese-made batteries. Expanded drone utilization will increase compliance requirements and reputation issues for Western-based manufacturers to prevent sanctioned actors from acquiring dual-use technology. Meanwhile, the sanctioning of Chinese manufacturers of dual-use equipment risks harming supply chains for legitimate Western users.



Pexels, Nic Wood

AI and the Future of Democracy

Democratic systems will be challenged by growth in artificial intelligence and the influence of those who own these systems – threatening electoral integrity, government integrity and the social compact between communities, companies and their governments.

AI propagated disinformation and influence operations competing with new government and industry countermeasures will further test election integrity in 2025.

In 2024, a string of important elections occurred, starting with Taiwan in January and running through to the US election in November. Among these, several in Eastern Europe, including Romania and Georgia, showed signs of having been significantly influenced by disinformation, AI and influence operations with Romania canceling the final round over election interference claims. Governments, technology companies, hackers and disinformation actors will all have learned from these elections as China, Russia, Iran and others experimented with generative AI tools to create election-related disinformation. Technology companies and governments similarly learned how to better identify and disrupt AI-generated disinformation operations. This arms race will continue in 2025, as malign actors, firms and governments battle to shape the use of AI in democracies. Additional critical elections will take place in 2025, including in Japan, Germany, Australia and Canada, with the accelerating uptake of AI in elections tying firms' reputations directly to how it is used. In democracies, politicians will add sophisticated AI tools and platforms to their campaigns, some of which will challenge democratic norms or generate reputation, activist and regulatory threats for technology firms. In less free countries, autocrats will act against AI where it promotes reform but use it to bolster their influence, creating reputation risk for companies either way. International regulation of AI in elections and democracy is unlikely in 2025, however, national legislative efforts will emerge as developed countries control AI's influence over their information spaces.

> **The AI arms race will continue in 2025 as malign actors, technology firms, governments, and civil society battle to shape the use of AI in democracies.**



Unsplash, Phil Hearing

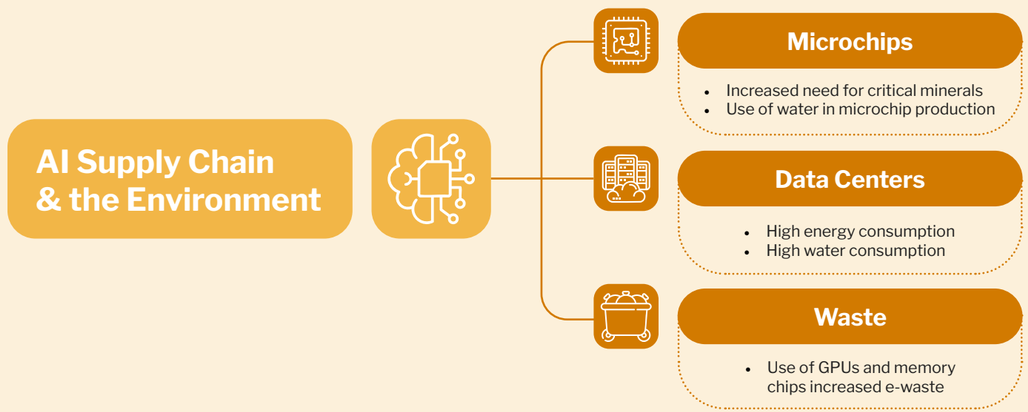
Technology industry leaders' influence on global politics will grow in 2025, drawing criticism from civil society and posing complex reputation and ethical questions for the wider business community.

The influence of high-profile social media, AI and technology platforms; the political and regulatory pressures on the technology industry; and the wealth of technology leaders will all increasingly draw their growing relationships with politicians and world leaders and into the public eye. This prominence will be a double-edged sword. On one hand, industry leaders will be able to educate policymakers at the highest levels on emerging technologies, advocating directly for industry interests. On the other hand, this access will draw allegations of undue influence and cronyism, while close relationships with politicians will inevitably draw criticism from their political rivals and their supporters, risking companies themselves being seen as partisan and therefore subject to political whiplash. The technology industry's political prominence will also carry security risks, with leaders increasingly targeted by politically motivated attackers and conspiracy theorists, while companies become activist targets.


Unsplash, Uberform

The environmental and human rights downsides of artificial intelligence will become more prominent in 2025, with regulators, activists and the public demanding improved performance or blocking expansion of infrastructure supporting AI.

Energy and water demands from artificial intelligence servers are a growing problem in developed and developing countries alike. The complex challenges associated with using more energy to create a solution to resource depletion amidst local community pushback and resource scarcity are pushing companies to establish bespoke power supply arrangements which are also drawing public scrutiny and frustration. As temperatures rise and water supplies contract, pressure will grow on technology companies to not only show that they are responsible environmental stewards but also to develop more efficient technologies for purely economic and commercial reasons. The critical minerals requirements of the advanced computers powering AI and batteries powering electric vehicles, laptops and cell phones will also drive increased scrutiny of AI supply chains. "Conflict minerals" entering company supply chains will draw not only brand harm but also legal action from affected national governments, while activists will scrutinize mining operations for child labor, forced labor and other abuses. The technology industry's reliance on Russia and China for critical minerals and processing operations will also come under strain in 2025, as the US, EU and other Western governments tighten sanctions on Moscow for the war in Ukraine and on Beijing for its treatment of minorities.



Source: Emergent Risk International

Elections in 2025

Germany: After the collapse of the ruling coalition, February election issues will include support for Ukraine, lower taxes, stricter borders and reduced welfare.

Poland: The May presidential election pits a center-right, pro-EU candidate against the incumbent Law and Justice (PiS) party candidate, making closer alignment with EU policies a campaign issue.

Japan: Growing chances of an opposition win in July upper house election risks policy uncertainty and political instability. The long dominant Liberal Democratic Party already lost their majority in the lower house in 2024.

Canada: Early polls suggest a likely change in government from the Liberal Party to the Conservative Party in October elections. The next government will likely tackle the 2026 review of the trade-focused United States-Mexico-Canada Agreement.

Philippines: Political violence is likely during May midterm elections with tensions rising between the Duterte and Marcos political dynasties.

Bangladesh: After the collapse of the long-standing Awami League government, the technocrat-led interim government could call elections in late 2025, but a delay into 2026 is likely, driving unrest.

Chile: The government's declining popularity could lead to a change of government in November-December elections, with potential changes to social spending risking social unrest.

France: Although parliamentary elections are not currently scheduled, political instability means they are a possibility. Constitutionally, new elections cannot be called before July.

Australia: Federal elections are likely by May and close polling suggests a change of government or minority government is possible.

Unsplash, Krystian Tambur

Jan

- 26 **Belarus** (Presidential)

Feb

- 9 **Ecuador** (General)
- 9 **Kosovo** (Legislative)
- 23 Germany (Legislative)

Mar

Apr

May

- **Philippines** (General)
- **Albania** (General)
- **Poland** (Presidential)
- **Australia** (General)

Jun

- 5 **Burundi** (Legislative)

Jul

- **Japan** (Upper House)
- **Moldova** (Legislative)

Aug

- 17 **Bolivia** (General)
- **Gabon** (General)

Sep

- 16 **Malawi** (General)

Oct

- 26 **Argentina** (Legislative)
- **Canada** (General)
- **Cameroon** (Presidential)
- **Cote d'Ivoire** (Presidential)
- **Tanzania** (General)
- **Jamaica** (General)
- **Ireland** (Presidential)

Nov

- **Chile** (First round, General)
- **Honduras** (General)
- **Guyana** (General)

Dec

- **Tajikistan** (Legislative)
- **Central African Republic** (General)
- **Czech Republic** (General)
- **Egypt** (Legislative)

TBD in 2025

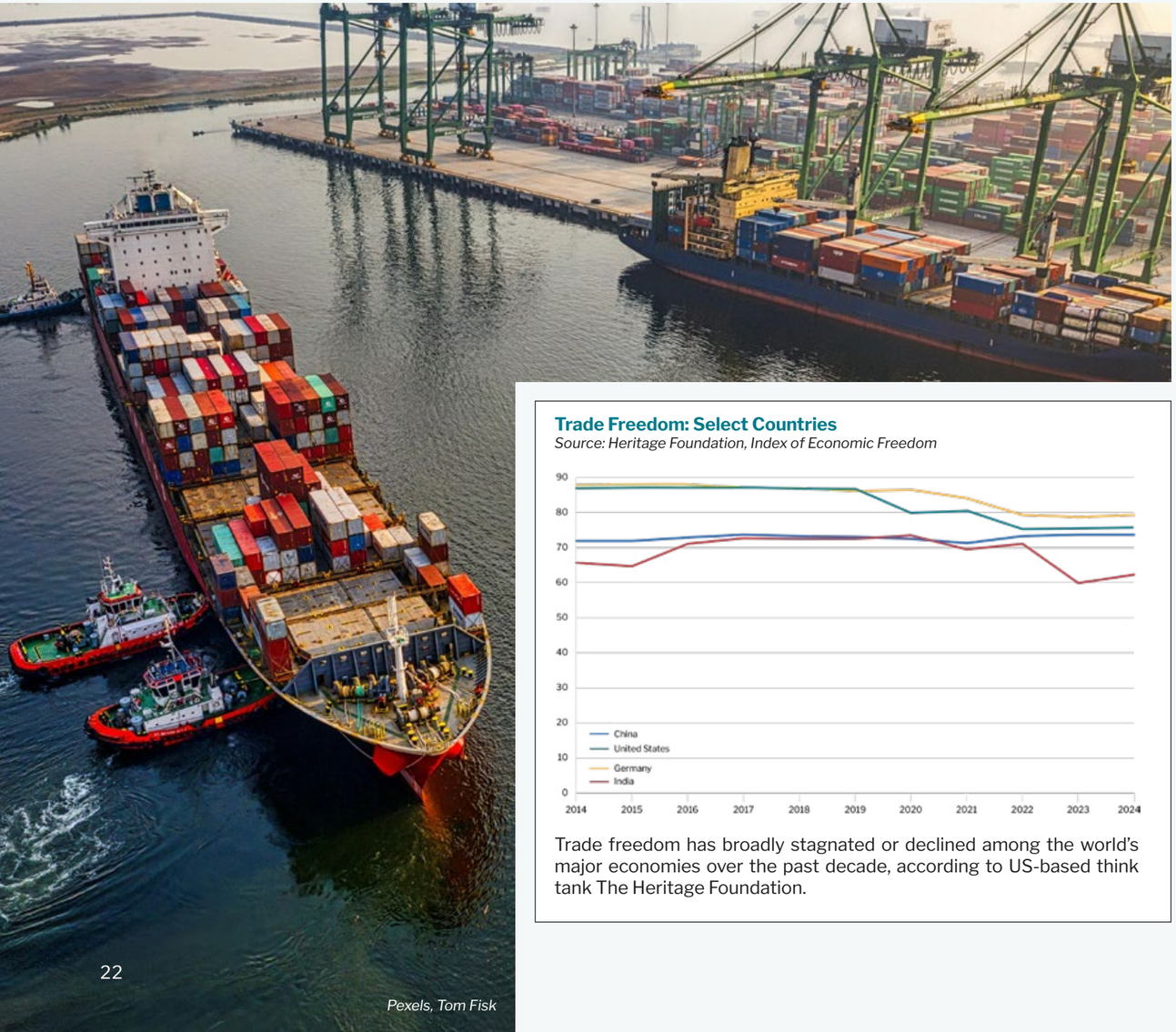
- **Bangladesh** (General)
- **Kyrgyzstan** (Legislative)
- **Belize** (General)
- **Singapore** (General)
- **Iraq** (Parliamentary)

Regulation, Trade and Geopolitics

The deteriorating geopolitical environment will drive increasing regulation that will weigh on global trade in 2025.

Trade costs will rise in 2025, as governments pass new regulations to address national security concerns – also elevating supply chain and compliance risk for businesses.

Geopolitical rivalries are intensifying global competition to control emerging technologies. The erosion of trust between competing countries is leading governments to implement trade barriers to protect sensitive domestic industries from foreign competition. Governments are expanding efforts to create secure supply chains for strategic industries, either at home or in friendly countries. Trade restrictions like export controls have also increased as countries try to maintain technological leads over rival powers in contested sectors. This trend will probably accelerate as the new US administration takes the reins at the start of the year, with the US likely imposing more tariffs in 2025, including on EU countries, Mexico, Canada and China.

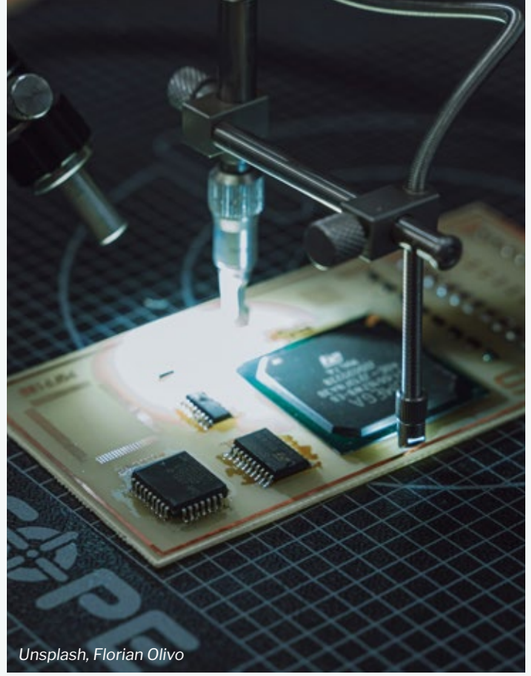


Pexels, Tom Fisk

Trade Freedom: Select Countries

Source: Heritage Foundation, Index of Economic Freedom

Trade freedom has broadly stagnated or declined among the world's major economies over the past decade, according to US-based think tank The Heritage Foundation.



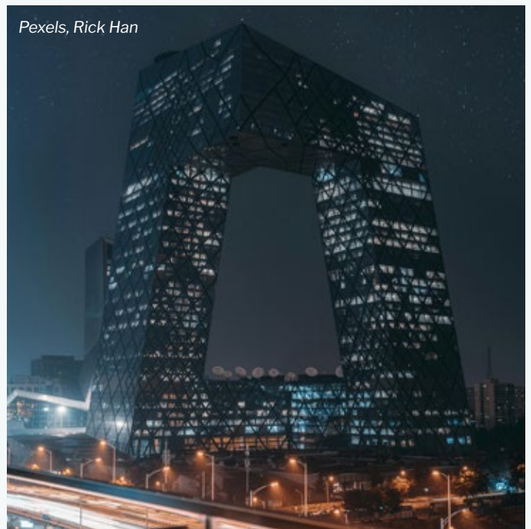
Unsplash, Florian Olivo

The incoming US administration will intensify efforts to cut off Chinese firms' access to advanced semiconductors and semiconductor manufacturing equipment.

This initiative will include more government monitoring of foreign semiconductor manufacturers that use US technology in their production. In November 2023, the US Department of Commerce ordered Taiwan Semiconductor Manufacturing Company (TSMC) — the world's largest chip manufacturer — to stop supplying Chinese entities with 7-nanometer chips or smaller. Under US pressure, the Dutch government in 2023 expanded restrictions on chipmaking equipment manufacturer ASML's exports to China. These US efforts aim to delay Chinese advances in emerging technologies like artificial intelligence and slow the growth of Chinese commercial rivals to US firms in more mature sectors such as smartphone manufacturing.

Governments will continue efforts to reduce the reliance strategic industries and technologies have on rival powers in 2025.

Global firms' commercial activities in emerging technology sectors will face further restrictions in 2025. In October 2024, the US Treasury finalized rules to restrict US investment in China in sectors such as artificial intelligence, semiconductors and quantum information technologies, which take effect in January. Additional US government restrictions will likely involve blocking Chinese entities' use of US cloud computing services. Another potential point of friction in 2025 will be between the EU on one side and the US and China on the other. European investigations using instruments like the Digital Markets Act into Chinese firms like Shein, TikTok and Temu or US companies like Meta and X will drive trade tensions.



Pexels, Rick Han

Western governments will push back against Chinese efforts to prop up domestic industries in strategically important or emerging technologies to keep Beijing from setting global standards in these areas.

Canada, the EU and the US government have all imposed tariffs on Chinese electric vehicle (EV) imports to protect their own automotive industries. In the US, the Biden administration proposed a ban on Chinese EVs due to national security concerns about their collection of personal data. Western governments are also focused on Chinese dominance over raw materials required to manufacture goods in strategic sectors like renewable energy. Since 2023, the Chinese government has imposed export restrictions on antimony, rare earths, graphite items, germanium and gallium products. China refines 68% of the world's cobalt, 65% of its nickel and 60% of electric battery-grade lithium. The US and allied governments have developed programs to create domestic or China-free critical mineral supply chains, including for critical minerals like rare earth elements. While these programs remain in their infancy and are only able to fulfill a small amount of Western industrial demand in 2025, government support will accelerate their growth.

"Canada, the EU and the US government have all imposed tariffs on Chinese electric vehicle (EV) imports to protect their own automotive industries."

AI, Climate and the Environment

Artificial intelligence and technological advances will strengthen climate knowledge and improve natural disaster management, but their intensive resource use will draw criticism and regulation in 2025.



Unsplash, Max Larochelle

Artificial intelligence technology will help humans better understand weather and the effects of climate change, improving natural disaster management.

Even its early days, generative AI has already improved weather forecasting and climate modeling. In 2025, it will become increasingly effective at predicting local weather, as well as improving planning and responses to storms, floods, tornados and other extreme weather events. AI systems will provide better modeling of climate change scenarios, including simulating local effects – seemingly an impossible task before now. AI offers the hope of being able to better implement local-level responses and mitigate the effects of extreme weather and natural disasters.

Growing wildfires, extreme heat waves, droughts and other natural disasters will test the business world's resilience in 2025.

Climate change has accelerated at a time when AI and new technology industries are exploding in development. Like all businesses, climate change-induced extreme weather will threaten the AI sector and those reliant on it in 2025. Much of the world's technology-driven economy is in areas facing climate risk-induced extreme weather, such as California and China, which each have some of the world's largest data centers and are regularly afflicted by drought, flooding, heat and other natural disasters. As the world sees a greater frequency of natural disasters, environmental activists and local communities will increasingly question the carbon dioxide emissions and water use of companies, broadening reputation risk. Local communities in both North and South America already started pressuring data center operators during droughts in 2024. As heat, droughts and data center construction become more frequent, political and protest pressure will threaten the reputations of companies with an disproportionate environmental footprint.



Unsplash, Malachi Brooks

AI's rising energy demands will drive costs and pose limitations for technology firms and the public, especially in concentrated zones of data center activity.

The rate of AI growth and energy use is exponential, as the computation power dedicated for AI is doubling about every 100 days. AI's electricity hunger will reshape power markets and how the public perceive technology firms that consume vast amounts of electricity. Technology firms will incur major electricity costs to fuel their AI efforts, driving increased power prices for the public. Some estimates project key data center regions could see a 20% increase in electricity prices in 2025. While developed countries have advanced energy infrastructure and are creating new efficient technologies that can likely meet the demands during earlier stages of AI acceleration, the speed of that acceleration will probably begin to pull away from existing efficiency in the coming years.

AI's water demand will be more manageable than energy requirements but also more controversial, focusing attention on the technology industry's environmental footprint.

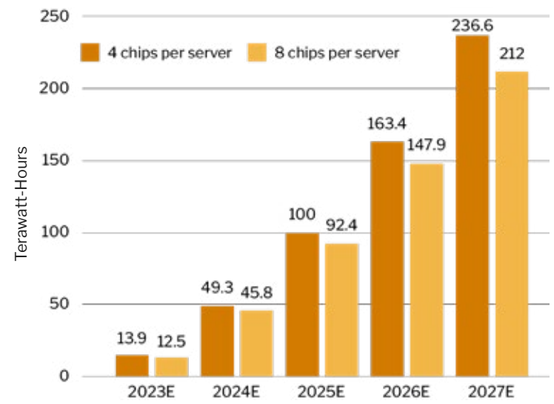
Water is another key ingredient to the functioning of data centers and generative AI, with individual technology firms using as much as 10 million cubic meters of water annually for cooling. Despite advances in data center water efficiency, the sheer scale of new data center construction means that AI's worldwide annual water use will approach 6.6 billion cubic meters by 2027 – roughly four times the yearly water use of Denmark. While firms are building data centers in areas with high water supply, the growing rate of water use will draw criticism and drive local regulation and planning restrictions. Water is the driver of many resource conflicts and will be the most controversial AI resource input, meaning firms' behavior on this front will be more closely scrutinized than their electricity use.



Unsplash, Matt Hardy

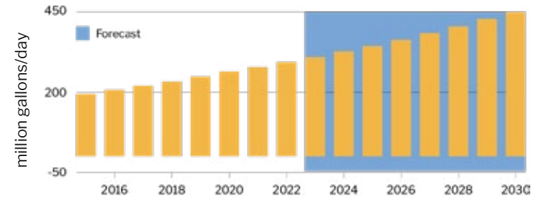
Generative AI Power Demand

Source: Morgan Stanley, 2024



Global Data Center Water Consumption

Source: Bluefield Research, 2024

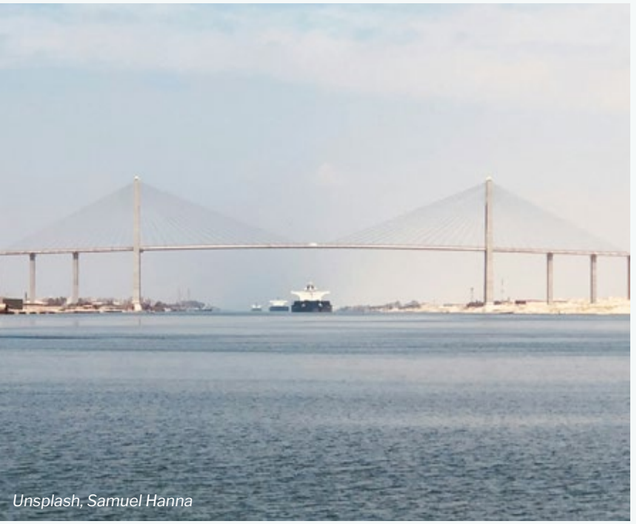


National and local governments will step up oversight measures on the technology industry's resource use, adding greater compliance burdens for developers and data center companies.

In 2025 and beyond, AI development will drive environmental regulation as governments seek to manage outsized resource consumers. In the US, state-level commissions in the data center heavy area of Ashburn, Virginia are investigating potential consumer protections and regulations for data centers, a trend likely to be mirrored in developed nations wherever large data centers are concentrated. Regulation of the technology industry's environmental footprint will not proceed in a straight line, however, as the political balance between regulation and deregulation evolves. In the end, the politics of local resource management will likely prevail, as local governments regulate at a local level, leaving firms to navigate a local, national and global tapestry of varying regulations.

Conflict, Geopolitics and Supply Chains

Conflict and competition will reshape global supply chains again in 2025, with disputes in far-flung regions of the world affecting businesses everywhere.



Unsplash, Samuel Hanna

Conflict will weigh on global supply chains through 2025, continuing to reroute the world's cargo around active conflict zones.

The world's two most prominent conflicts – Russia-Ukraine and Israel-Hamas – will both continue into 2025. While global supply chains have reorganized around these conflicts over the past three years, both conflicts have led to attacks on commercial shipping, making world supply chains less efficient. Western sanctions on Russia have changed where it sells its energy and minerals but have also forced the rerouting of air, land and sea cargo around the battlespace. In the Middle East, Houthi attacks on Israel-linked Red Sea shipping have forced much of the world's cargo to detour around Africa, adding time and expense for almost all shipping between Asia and Europe. Shipping constraints in the Black Sea and Red Sea will continue through 2025, with hostile actors and militants observing how to close strategic shipping lanes, potentially leading to disruptions in the Persian Gulf, the Baltic Sea or elsewhere if conflicts expand.

Suez Canal Transit Calls
7-day moving average
Source: International Monetary Fund



Shipping transiting the Cape of Good Hope to avoid conflict in the Red Sea remains high since the onset of Houthi attacks in the Red Sea. The Cape of Good Hope route adds 7-10 days to ships transit time increasing time to port and costs for labor and fuel.

Russia's active conflict in Ukraine and hybrid warfare against the West threatens to disrupt energy flows and keep food prices high globally.

Ukraine's agricultural production will remain strained in 2025, as Russia's aggression in Ukraine and the Black Sea continues to damage Ukrainian grain and sunflower harvests and makes Ukraine's export routes longer and less efficient. After three years of war, global food supply chains have largely adapted to changed Russian and Ukrainian export patterns, with other suppliers like India increasing exports. However, as a whole, global food supply chains are less streamlined than they were pre-war, adding to global food inflation pressures and contributing to shortages in some parts of the world. Russia will continue its Ukraine war in 2025 and expand its hybrid warfare against Europe and the US, including cyberattacks and sabotage operations against energy infrastructure, threatening disruptive damage if the conflict escalates.



Unsplash, Miningwatch Portugal

Global mineral supply chains will be increasingly scrutinized for their contributions to conflicts, as well as human rights and labor violations, with downstream multinational clients held accountable.

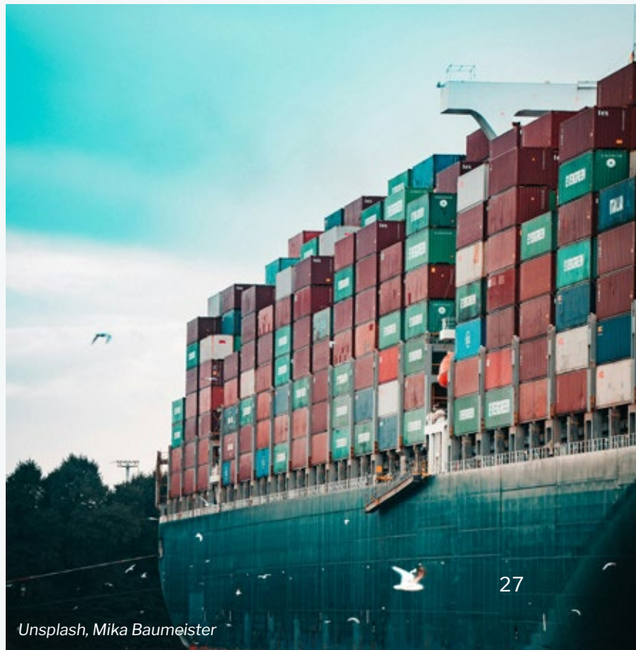
As the global economy increasingly relies on renewable energy, batteries, artificial intelligence and other advanced technologies, critical minerals for those technologies have become indispensable. With many of those minerals sourced from countries with active conflicts, corruption and weak regulation, human rights abuses and labor rights violations have long been a problem for multinational supply chains. In 2025, however, those problems will increasingly become the concern of downstream multinational end users, as governments and activists allege companies are profiting from 'conflict minerals'. Shareholders and civil society will continue to pressure companies to scrutinize their supply chains to ensure critical mineral purchases are not supporting conflicts, such as in the Democratic Republic of Congo; post-coup military regimes across the Sahel; child labor in Africa or Latin America; or repression of minorities in China's Xinjiang region.



Unsplash, Polina Rytova

US-China competition and China's pressure campaign against Taiwan will increasingly force the reordering of global technology supply chains.

US-China competition will be a defining feature of 2025's geopolitical landscape, and much of that competition will be fought in technology industry supply chains. The new US administration will expand on its predecessor's strategy of restricting China's access to advanced technology – hoping to maintain a strategic edge – and implement punitive tariffs designed to make Chinese goods less competitive. But with less optimism about the prospects of a constructive relationship, Beijing will be more inclined to retaliate, exploiting its dominance of critical mineral processing and technologies like batteries and solar energy to cause the US and its allies economic harm, forcing Western firms to either find new suppliers or be beholden to China's mood.



Unsplash, Mika Baumeister

Technology and Global Discontent

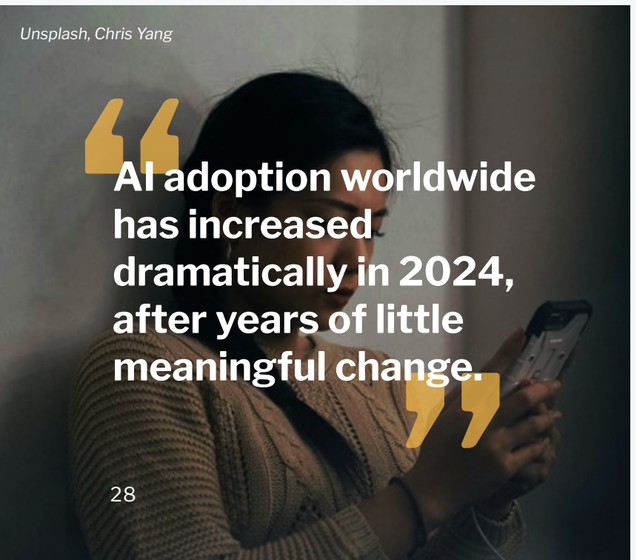
Some workforces will resist AI adoption and integration in 2025 while non-state actors will increase their AI use to further their agendas.

Activists and civil society organizations will increase their AI use to stir engagement, creating new regulatory challenges for technology firms and amplifying reputation risk for business government and multi-lateral organizations.

Increased access to and rapid development of AI dramatically increases the rate at which media campaigns can be produced, amplifying their impact. Over 34 million people shared the AI-generated pro-Palestine "All Eyes on Rafah" story using Instagram's "Add Yours" template. Like "All Eyes on Rafah," some AI-generated images will enable activists to evade keyword-based content moderation on social media platforms by embedding text within images. Activists will use the force-multiplying power of AI to further causes ranging from human rights and politics to data privacy and climate change. Use of AI tools will help these organizations create eye-catching, intercontinental and cost-effective campaigns, particularly in the resource-strained Global South. These groups will use AI-created content to engage with audiences on sensitive issues, such as using futuristic images and videos to evoke a sense of urgency on climate change. AI may also be used by activists as an opportunity to maneuver around authoritarian governments. The Pakistani opposition party Pakistan Tehreek-e-Insaf (PTI) in December 2023 used AI to clone its jailed leader Imran Khan's voice to address supporters, allowing it to sidestep state suppression.



Unsplash, Camilo Jimenez



Unsplash, Chris Yang

"AI adoption worldwide has increased dramatically in 2024, after years of little meaningful change."

As the technology becomes more accessible in 2025, extremists will exploit AI to support recruitment, spread propaganda and augment hybrid warfare tactics.

AI will help extremists disseminate propaganda, automating the image and video-generating process in disinformation campaigns. The Increasing sophistication of AI technology will also make it harder to detect extremist propaganda, increasing its reach. Islamic State's (IS) regional affiliates are already using generative AI to mass translate IS propaganda from Arabic to other languages. In 2023, IS published a support guide on how to effectively and securely use generative AI, forging a path for other extremist groups. Extremists may start using AI-powered chatbots to aid recruitment, making it difficult for law enforcement to take down extremist accounts or prosecute individual perpetrators, granting them greater anonymity. Militants will likely also attempt to scale up their AI use in direct or hybrid warfare. AI-technology embedded in drones helps them complete complex tasks with greater autonomy, including navigation, object detection and real-time changes to automated commands and requires minimal training to operate. Malicious actors could also employ AI to augment cyberattacks, including using large language models for social engineering attacks.



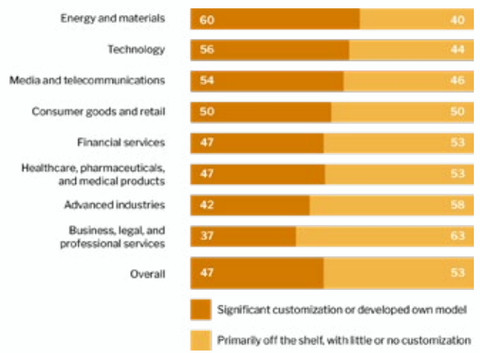
"Over 60% of surveyed US companies plan to use AI to automate tasks previously completed by employees."

Unsplash, Karollyne Videira Hubert

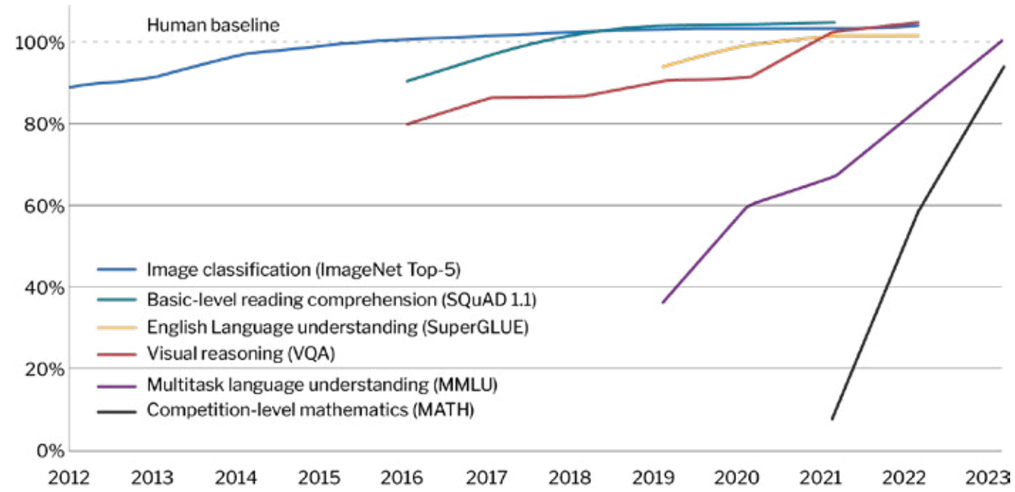
AI's enabled automation and perceived threats to employment will drive resistance in some workplaces, raising the likelihood of strikes this year.

Workers' unions are monitoring major AI developments closely for information on how AI will replace human workers. Protests and strikes such as the one by US dockworkers over automation will become more common in 2025. This rising discontent will not be limited to manufacturing, mining or other physically demanding professions but it will include creative and technical fields, as well, such as writing, content design or coding. Greater AI integration into workplaces will alter the number of workers and skill sets required, fueling fears among employees, particularly where breakthroughs create easier pathways to creating cost efficiencies. Over 60% of surveyed US companies plan to use AI to automate tasks previously completed by employees, according to Duke University and the Federal Reserve Banks of Atlanta and Richmond. However, many companies are planning for these efficiency gains to allow current workers to focus on higher order tasks creating more demand side risk for workers than immediate workforce reduction risk.

Strategy for developing generative AI capabilities
% of reported instances of use
Source: McKinsey, Global Survey on AI



Select AI Index technical performance benchmarks vs. human performance
Source: AI Index, 2024



I3: Retrospective for the Future



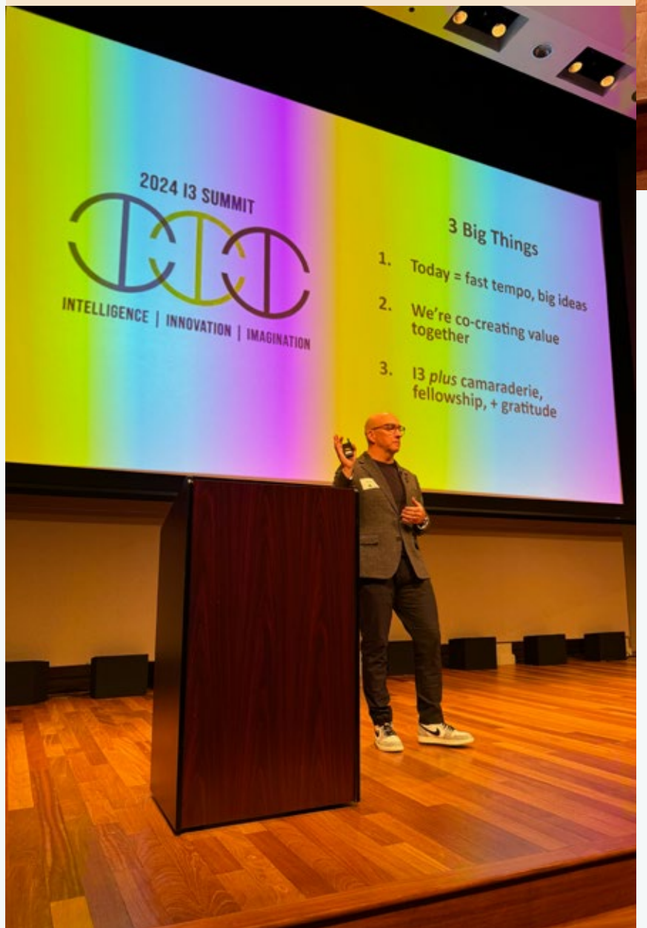
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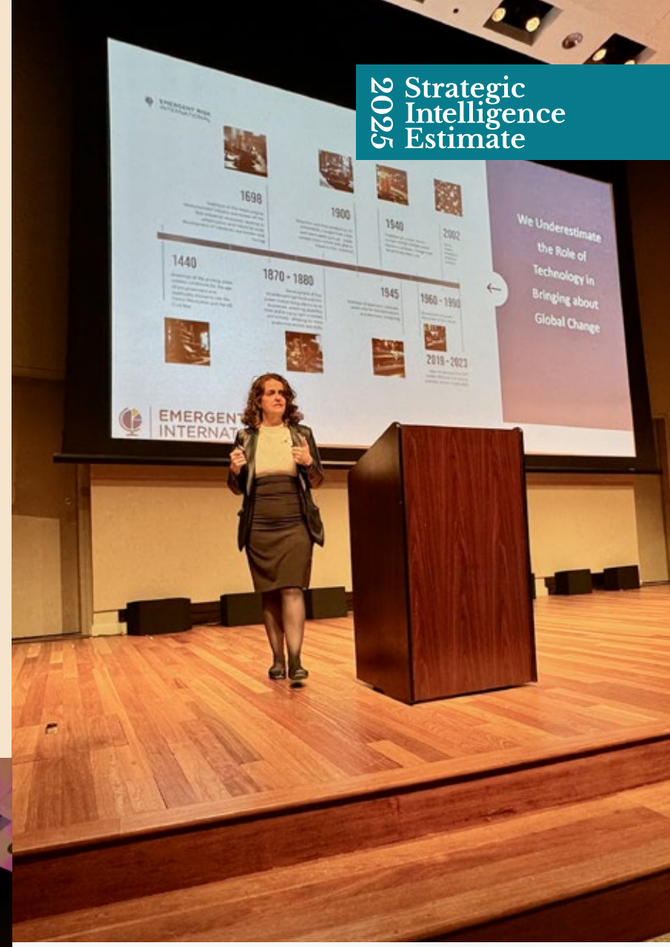
The Intelligence, Innovation and Imagination Summit - I3

Today and in the coming years, intelligence professionals will grapple with the challenges of integrating and optimizing AI into their workstreams. The need to do so is not optional, and to ignore these changes in favor of “how we’ve always done it,” will be at our own peril. Not because it will take intelligence jobs – although it will likely take some. But because intelligence professionals who do not understand changes in technology will not be able to compete in speed, efficiency or accuracy with those who do.

In November 2024, Emergent Risk International, in partnership with INTELAB Ventures and Capital One launched the first I3 Summit, a conference aimed at bringing more innovative thought leadership to the world of public and private sector intelligence. Our goal was ambitious: to redefine what an intelligence conference could be and to create an environment that would spark revolutionary ideas. With technology and innovation at the forefront of our respective company’s aims (to bring our clients the most relevant products), we took this one step further, aiming to build more capacity for innovative thinking about the future across the entire field of public and private sector intelligence.

During I3 Summit, our speakers analyzed ways in which the field could benefit from advances in technology and data science, and how this can augment the work of intelligence professionals in the future. The conference showcased cutting edge developments in the OSINT world such as; the Office of the Director of National Intelligence (ODNI)’s work to create better pathways for sharing Open Source Intelligence (OSINT) between government and private sector partners; the Truth in Media Cooperative’s efforts to address the provenance and veracity of information; studies by the FBI Analyst Association on the Intelligence Analyst of the Future; and the Special Competitive Studies Project on a Day in the Life of an AI augmented analyst among others.





We also shared engaging talks with other intelligence technology founders about their thoughts on the future of intelligence and through a series of workshops landed on a number of ideas and routes forward for intelligence professional of the future. The outputs from the workshops will be distilled into three whitepapers, scheduled to be published in Q1 2025.

The I3 Summit is a new benchmark for the public and private sector intelligence community as we look for more ways to develop comprehensive intelligence solutions that benefit people, organizations, nations and global security in an exceptionally complex world. It was just the first of many. We look forward to bringing more great thought leadership and events like this to the world in 2025 and beyond.



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